# Supervisor/Manager Prepares an Evaluation for an Employee

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| **Navigation: Main Menu>Performance Management>Performance Documents>Current Documents** | |

| Instructions | ACORN Page |
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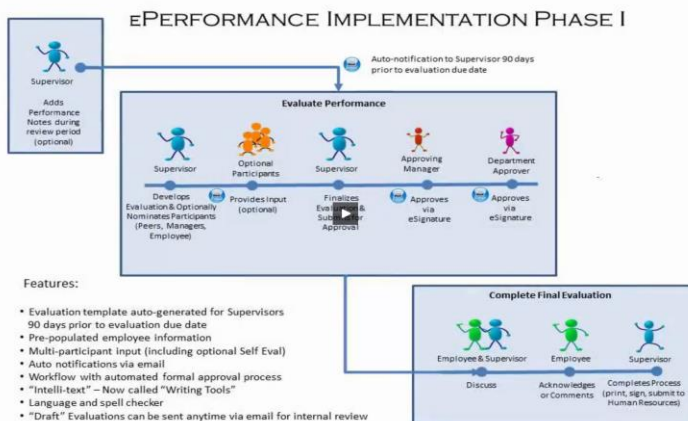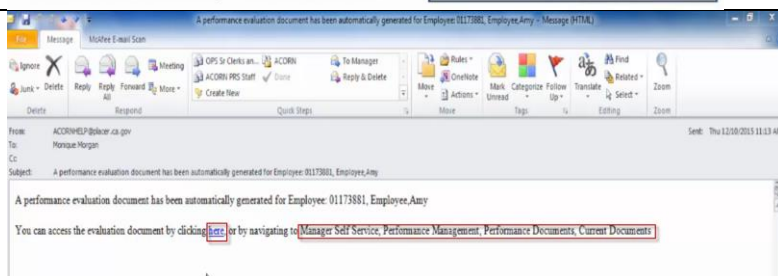**PURPOSE:** This outlines the process for a supervisor to prepare a performance evaluation. The ACORN e-Performance system will generate an evaluation 90-days prior to the Next Review date (maintained within ACORN Job Data). The Supervisor will receive an e-mail notification that the evaluation has been created. The employee will also receive an e-mail notification for an optional self-evaluation.

*IMPORTANT – Please ensure you clear your cache and cookies and that your browser settings are correct prior to starting an evaluation. Please email ePerf@placerco.ad if you are unsure where to find the most recent browser settings documentation. IF YOU DO NOT PERFORM THESE FUNCTIONS ePerformance MAY NOT WORK AS DESIGNED.*
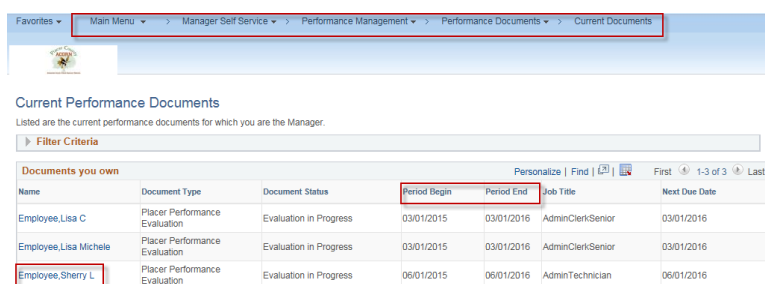
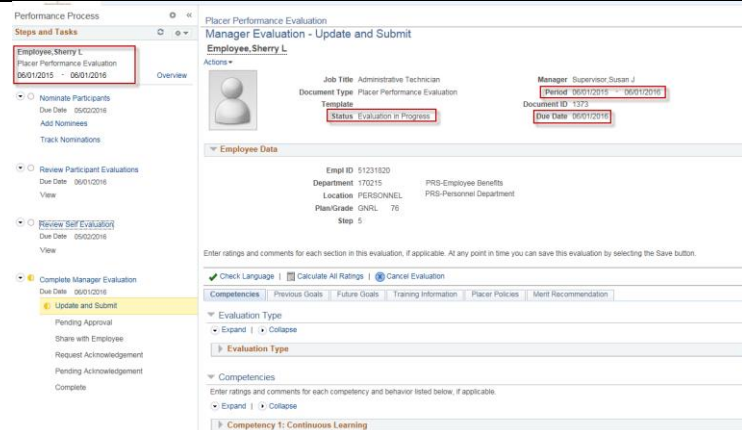| | |
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| 1. Cycle of a performance evaluation. |  |
| 2. When the Supervisor receives the email notification that an evaluation is due, he/she will have two options to get to the evaluation. Click on the link or follow the navigation provided in the email. |  |
| 3. Navigate in ACORN to **Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents.** A list of employees that are currently due an evaluation will be displayed. Select the document you want to view/update by clicking on the employee's name. |  |

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**Overview of ePerformance Dashboard:**
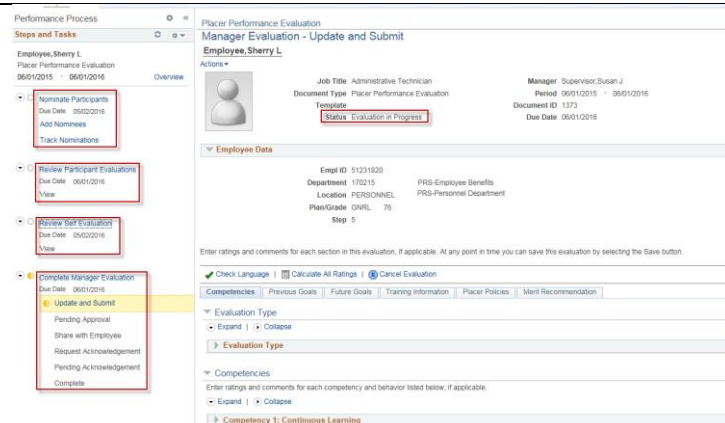
4. The left side of the page – Here you will find the "Steps and Tasks" pagelet. It notates the name of the employee and the review period. The "Update and Submit" task under the "Complete Manager Evaluation" step will be highlighted, indicating where in the review process the evaluation is located.

5. The middle of the page – Here you can find pertinent information about the employee's classification, evaluation period and status. Below that you will find the evaluation tabs where you will input relevant information to produce a printed evaluation.
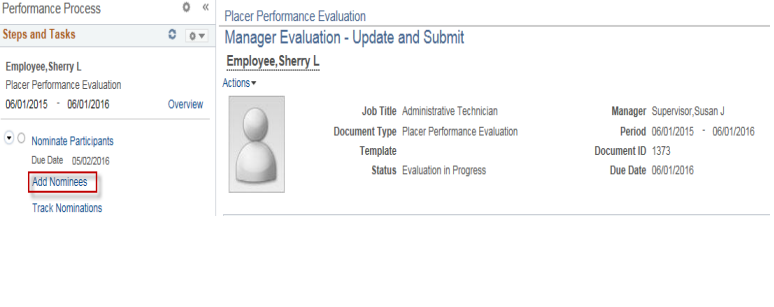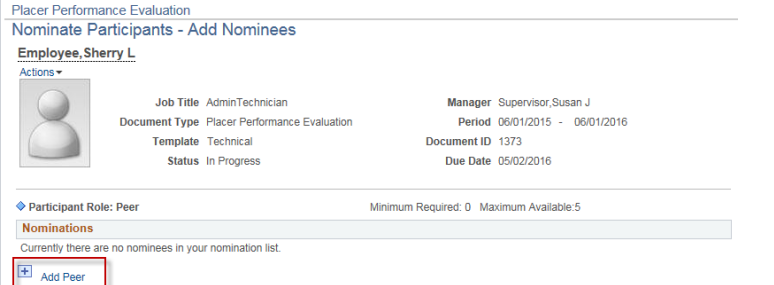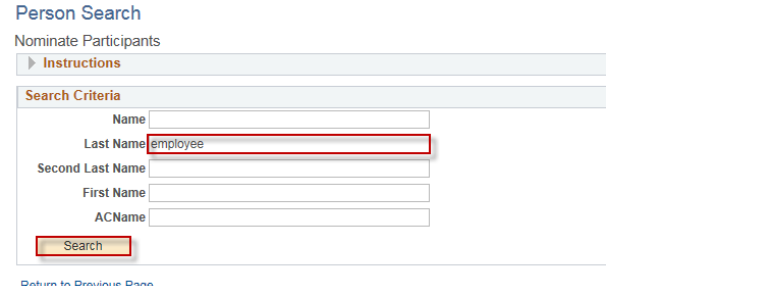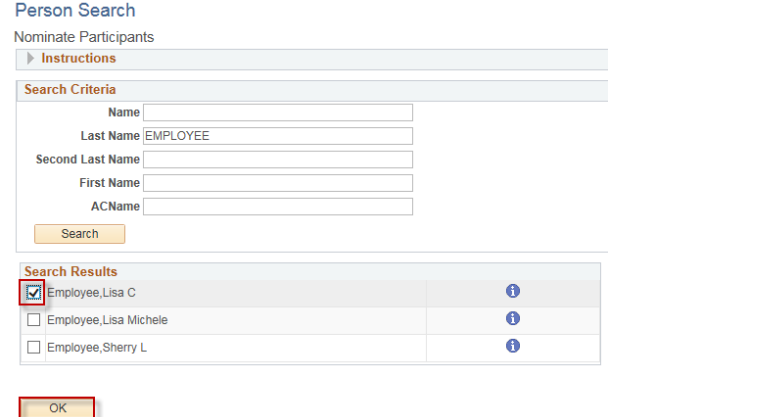
6. The upper right-hand corner - Here you can choose to Return to Current Documents, save your updates (**be sure to "Save" regularly as there is no auto-save feature**). Select the "Submit for Approval" button when you are ready to request approval.
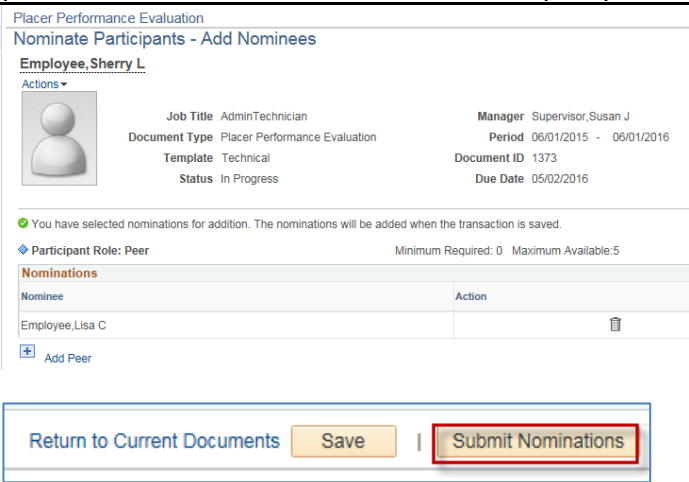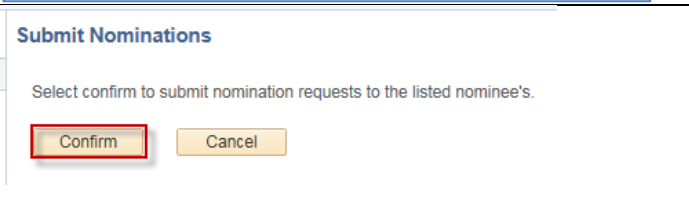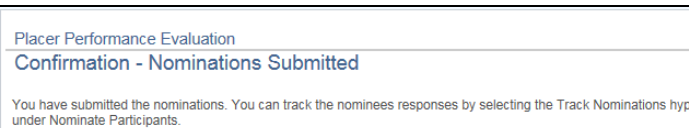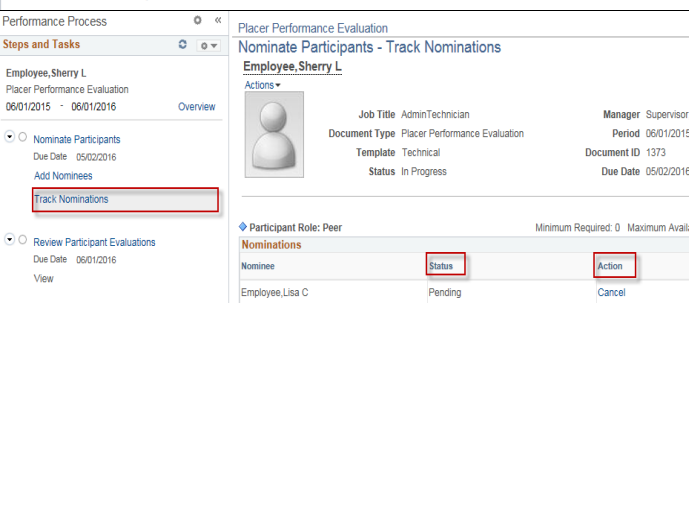
7. **Steps and Tasks** – This is where the Supervisor will identify each step of the evaluation process from nominating participants to completing the evaluation. The bubbles next to the task will become green when completed. The Employee's evaluation should have a status of "Complete" after going through all of the appropriate steps.

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| 8. **Nominate Participants** - The Supervisor will have the ability to nominate up to five individuals that he/she would like to give an opportunity to provide feedback on the evaluation. This could be other Managers, former Supervisors or Co-workers. Click the "Add Nominee" link. | Performance Process<br>Steps and Tasks<br>Employee,Sherry L<br>Placer Performance Evaluation<br>06/01/2015 - 06/01/2016    Overview<br>Nominate Participants<br>Due Date  05/02/2016<br>Add Nominees<br>Track Nominations<br><br>Placer Performance Evaluation<br>Manager Evaluation - Update and Submit<br>Employee,Sherry L<br>Actions▾<br>Job Title  Administrative Technician    Manager  Supervisor,Susan J<br>Document Type  Placer Performance Evaluation    Period  06/01/2015 - 06/01/2016<br>Template    Document ID  1373<br>Status  Evaluation in Progress    Due Date  06/01/2016 |
| 9. Click the "Add Peer" link. | Placer Performance Evaluation<br>Nominate Participants - Add Nominees<br>Employee,Sherry L<br>Actions▾<br>Job Title  AdminTechnician    Manager  Supervisor,Susan J<br>Document Type  Placer Performance Evaluation    Period  06/01/2015 - 06/01/2016<br>Template  Technical    Document ID  1373<br>Status  In Progress    Due Date  05/02/2016<br><br>◆ Participant Role: Peer    Minimum Required: 0  Maximum Available:5<br>Nominations<br>Currently there are no nominees in your nomination list.<br>⊞  Add Peer |
| 10. Enter the Nominee's Last Name and click the "Search" button. | Person Search<br>Nominate Participants<br>▸ Instructions<br>Search Criteria<br>Name<br>Last Name  employee<br>Second Last Name<br>First Name<br>ACName<br>Search<br>Return to Previous Page |
| 11. Click the checkbox next to the appropriate Nominee's name and click the "OK" button. | Person Search<br>Nominate Participants<br>▸ Instructions<br>Search Criteria<br>Name<br>Last Name  EMPLOYEE<br>Second Last Name<br>First Name<br>ACName<br>Search<br><br>Search Results<br>☑ Employee,Lisa C    ⓘ<br>☐ Employee,Lisa Michele    ⓘ<br>☐ Employee,Sherry L    ⓘ<br><br>OK |

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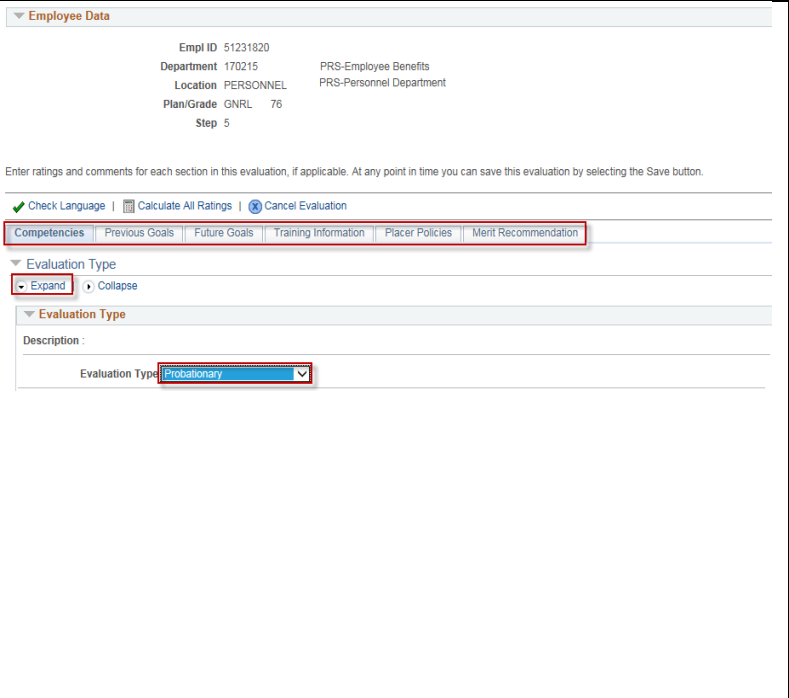| | |
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| 12. Click on the "Submit Nomination" button in the upper right-hand corner.<br>13. The Nominee will receive an e-mail notification of the Nomination. They will then have the opportunity to accept or decline the nomination. If they decline they can provide comments about why they declined. | Placer Performance Evaluation<br>**Nominate Participants - Add Nominees**<br>**Employee,Sherry L**<br>Actions ▾<br><br>Job Title AdminTechnician  Manager Supervisor,Susan J<br>Document Type Placer Performance Evaluation  Period 06/01/2015 - 06/01/2016<br>Template Technical  Document ID 1373<br>Status In Progress  Due Date 05/02/2016<br><br>✅ You have selected nominations for addition. The nominations will be added when the transaction is saved.<br>◆ **Participant Role: Peer**  Minimum Required: 0  Maximum Available:5<br>**Nominations**<br>| Nominee | Action |<br>|---|---|<br>| Employee,Lisa C | 🗑 |<br>➕ Add Peer<br><br>Return to Current Documents  Save  \|  Submit Nominations |
| 14. Click on the "Confirm" button to submit the nomination. | **Submit Nominations**<br><br>Select confirm to submit nomination requests to the listed nominee's.<br><br>Confirm  Cancel |
| 15. You will receive a Confirmation. | Placer Performance Evaluation<br>**Confirmation - Nominations Submitted**<br><br>You have submitted the nominations. You can track the nominees responses by selecting the Track Nominations hyperlink under Nominate Participants. |
| 16. On the left-hand side of the page you will be able to "Track Nominations". As a guideline, it's best to immediately go into the evaluation and nominate any participants as soon as you receive an email notification that an evaluation is due. Then give the nominees a bit of time to accept and provide you with comments. Once you receive notification that comments have been submitted, go in and start the actual rating process beginning in the next step. | Performance Process  ⚙ «<br>**Steps and Tasks**  ⟳ ⚙▾<br>Employee,Sherry L<br>Placer Performance Evaluation<br>06/01/2015 - 06/01/2016  Overview<br>⊙ Nominate Participants<br>Due Date 05/02/2016<br>Add Nominees<br>Track Nominations<br>⊙ Review Participant Evaluations<br>Due Date 06/01/2016<br>View<br><br>Placer Performance Evaluation<br>**Nominate Participants - Track Nominations**<br>**Employee,Sherry L**<br>Actions ▾<br><br>Job Title AdminTechnician  Manager Supervisor,Susan J<br>Document Type Placer Performance Evaluation  Period 06/01/2015 - 06/01/2016<br>Template Technical  Document ID 1373<br>Status In Progress  Due Date 05/02/2016<br><br>◆ **Participant Role: Peer**  Minimum Required: 0  Maximum Available:4<br>**Nominations**<br>| Nominee | Status | Action |<br>|---|---|---|<br>| Employee,Lisa C | Pending | Cancel | |

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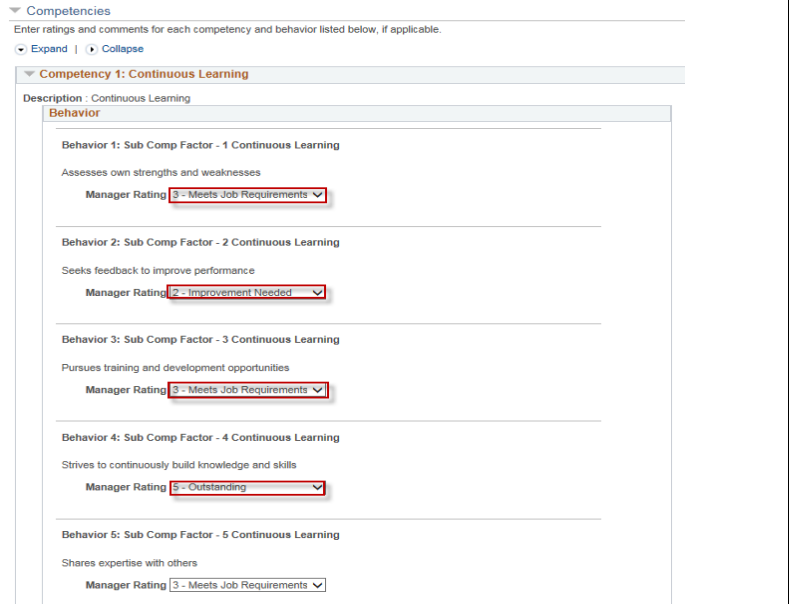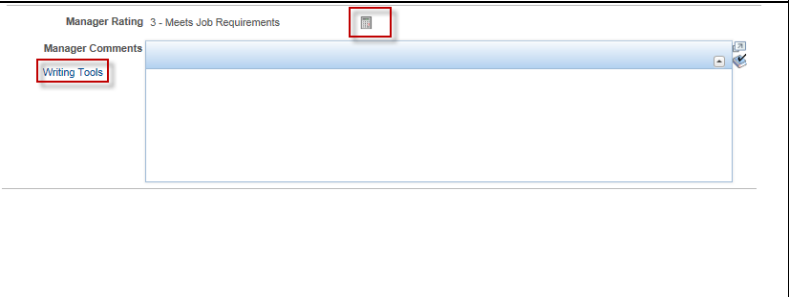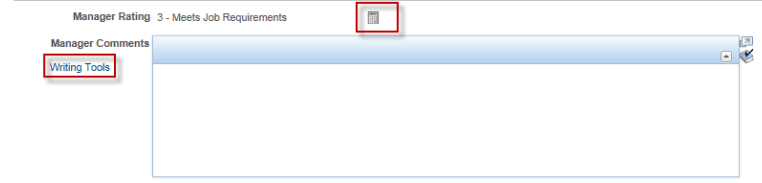| | |
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| 17. The Supervisor will be working through each of the tabs in the main body of the dashboard.<br>• Competencies<br>• Previous Goals<br>• Future Goals<br>• Training Information<br>• Placer Policies<br>• Merit Recommendation<br>18. **Begin the evaluation** by "Expanding" the "Evaluation Type", click on the dropdown arrow and select the appropriate "Evaluation Type".<br>• Annual<br>• Interim<br>• Probationary (Completion of Probation Period) | **Employee Data**<br><br>Empl ID 51231820<br>Department 170215 PRS-Employee Benefits<br>Location PERSONNEL PRS-Personnel Department<br>Plan/Grade GNRL 76<br>Step 5<br><br>Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.<br><br>✔ Check Language \| Calculate All Ratings \| ✖ Cancel Evaluation<br><br>Competencies \| Previous Goals \| Future Goals \| Training Information \| Placer Policies \| Merit Recommendation<br><br>Evaluation Type<br>▸ Expand ▸ Collapse<br>Evaluation Type<br>Description :<br>Evaluation Type Probationary ▾ |
| 19. Starting with the first competency listed, rate the Employee in each sub-competency using the dropdown arrow and selecting the value. Each sub-competency must have a rating. The ratings and corresponding Numeric Values will be:<br>• Unacceptable – 1.0<br>• Improvement Needed – 2.0<br>• Meets Job Requirements – 3.0<br>• Exceeds Job Requirements – 4.0<br>• Outstanding – 5.0 | Competencies<br>Enter ratings and comments for each competency and behavior listed below, if applicable.<br>▸ Expand ▸ Collapse<br>Competency 1: Continuous Learning<br>Description : Continuous Learning<br>Behavior<br><br>Behavior 1: Sub Comp Factor - 1 Continuous Learning<br>Assesses own strengths and weaknesses<br>Manager Rating 3 - Meets Job Requirements ▾<br><br>Behavior 2: Sub Comp Factor - 2 Continuous Learning<br>Seeks feedback to improve performance<br>Manager Rating 2 - Improvement Needed ▾<br><br>Behavior 3: Sub Comp Factor - 3 Continuous Learning<br>Pursues training and development opportunities<br>Manager Rating 3 - Meets Job Requirements ▾<br><br>Behavior 4: Sub Comp Factor - 4 Continuous Learning<br>Strives to continuously build knowledge and skills<br>Manager Rating 5 - Outstanding ▾<br><br>Behavior 5: Sub Comp Factor - 5 Continuous Learning<br>Shares expertise with others<br>Manager Rating 3 - Meets Job Requirements ▾ |
| 20. Above the "Manager Comments" section, click on the icon, which is a calculator function. This will total the sub-items to give an overall "Manager Rating" for that competency. This is not required, as the system will calculate it for you at the end, but is available for your use. | Manager Rating 3 - Meets Job Requirements 🖩<br>Manager Comments<br>Writing Tools |

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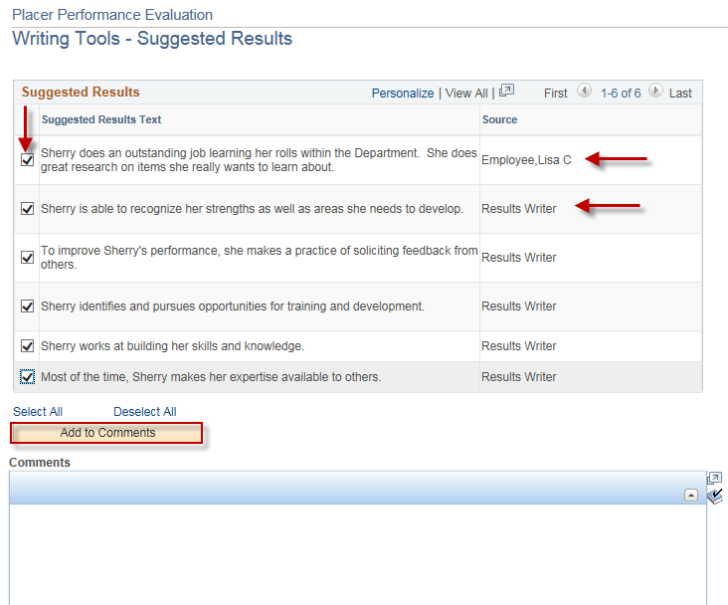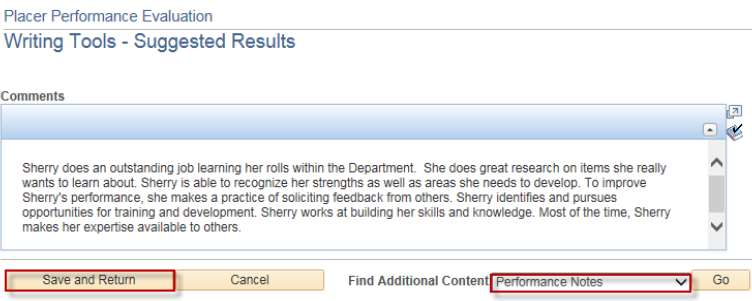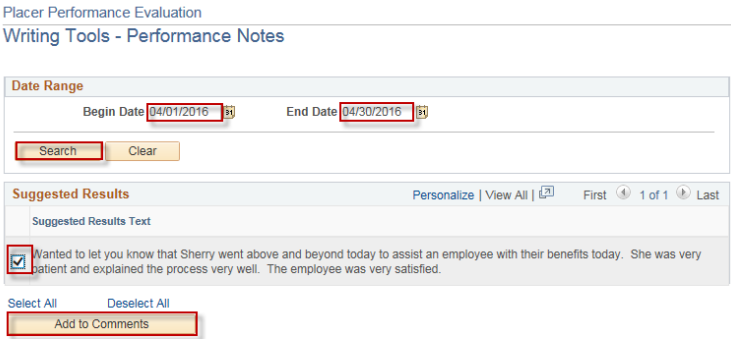| | |
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| 21. In the "Manager Comments" section, the Supervisor will have the ability to enter comments. By clicking on the "Writing Tools" link, the Supervisor will be able to insert comments from the Nominees, comments from the Employee's self-evaluation, and choose from predefined comments which are based on the ratings you selected. The predefined comments will be personalized to include the Employee's name and will be based on the Employee's gender.<br><br>22. Click the "Writing Tool" link to see the predefined comments. | Manager Rating 3 - Meets Job Requirements<br><br>Manager Comments<br>Writing Tools |
| 23. On the "Writing Tools – Suggested Results" page you will find the comments that are related to the ratings for that Competency section. The "Source" column identifies where the comments come from. "Results Writer" are the predefined comments. If the Employee or nominees have submitted comments on this specific competency, their comments will also appear on the list and their name. You have the option to use their comments or to consider them as you rate.<br><br>24. Select the comments you want to add to the comment box, which can be edited once you add them to the narrative box. You can choose to select only specific comments by selecting the check box next to the comment, or you can click on the "Select All" link to insert all comments. Click the "Add to Comments" button. | Placer Performance Evaluation<br>Writing Tools - Suggested Results<br><br>**Suggested Results** — Personalize | View All | First 1-6 of 6 Last<br><br>**Suggested Results Text** / **Source**<br>☑ Sherry does an outstanding job learning her rolls within the Department. She does great research on items she really wants to learn about. — Employee,Lisa C<br>☑ Sherry is able to recognize her strengths as well as areas she needs to develop. — Results Writer<br>☑ To improve Sherry's performance, she makes a practice of soliciting feedback from others. — Results Writer<br>☑ Sherry identifies and pursues opportunities for training and development. — Results Writer<br>☑ Sherry works at building her skills and knowledge. — Results Writer<br>☑ Most of the time, Sherry makes her expertise available to others. — Results Writer<br><br>Select All    Deselect All<br>Add to Comments<br>Comments |

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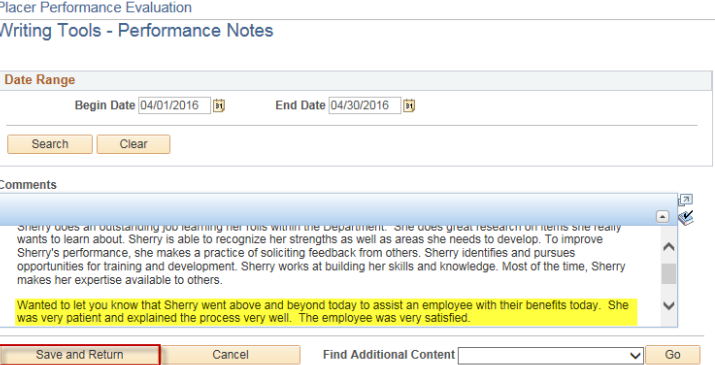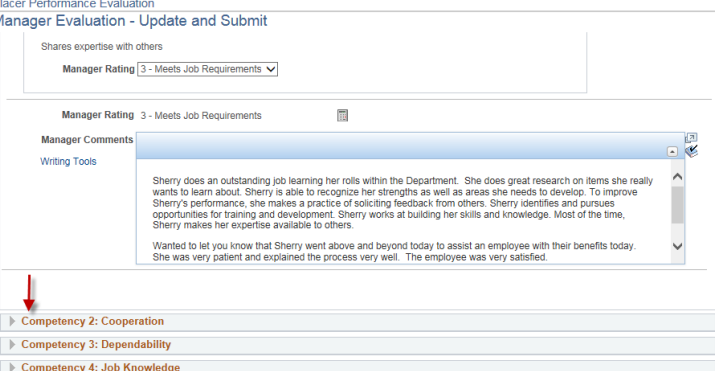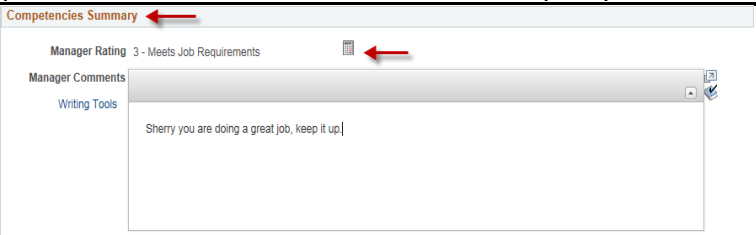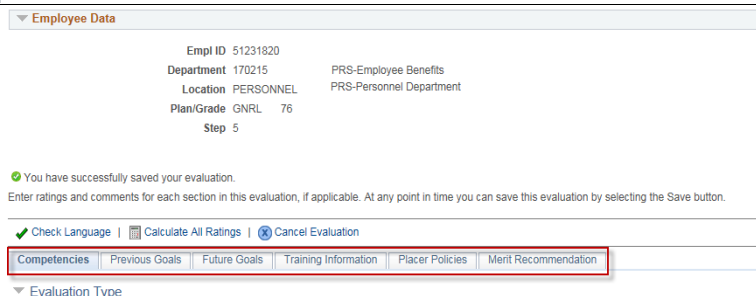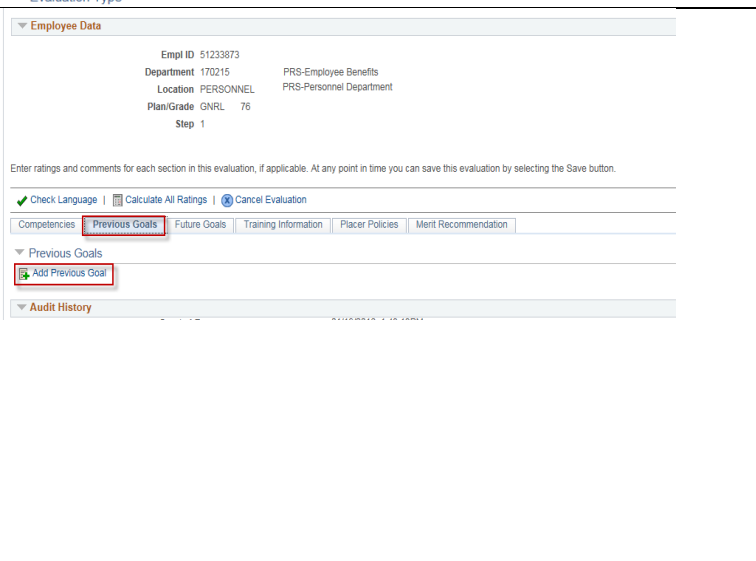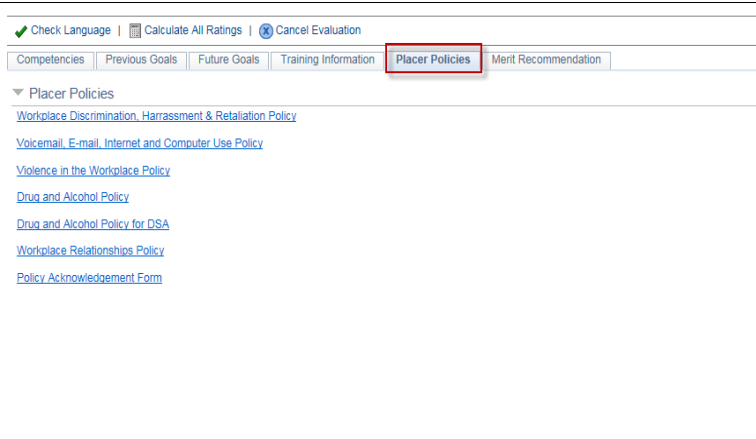| | |
|---|---|
| 25. The comments that were checked will be added into the "Comments" box. You may still insert additional narrative of your own and customize it to meet your needs. <br><br> 26. By clicking on the "Find Additional Content", you will have the ability to insert other comments such as Performance Notes that you may have added throughout the evaluation period.  Click the "Go" button. | Placer Performance Evaluation <br> **Writing Tools - Suggested Results** <br><br> **Comments** <br><br> Sherry does an outstanding job learning her rolls within the Department.  She does great research on items she really wants to learn about. Sherry is able to recognize her strengths as well as areas she needs to develop. To improve Sherry's performance, she makes a practice of soliciting feedback from others. Sherry identifies and pursues opportunities for training and development. Sherry works at building her skills and knowledge. Most of the time, Sherry makes her expertise available to others. <br><br> [Save and Return]   [Cancel]   Find Additional Content [Performance Notes ▼]   [Go] |
| 27. Enter the "Date Range", and then click the "Search" button.  Any Performance Notes that have been created will display and you will have the option to add these notes into the comments section of the evaluation.  Click the checkbox for the comments you want to insert, and then click the "Add to Comments" button. | Placer Performance Evaluation <br> **Writing Tools - Performance Notes** <br><br> **Date Range** <br> Begin Date [04/01/2016]   End Date [04/30/2016] <br><br> [Search]   [Clear] <br><br> **Suggested Results**   Personalize | View All | 🔳   First ◀ 1 of 1 ▶ Last <br> **Suggested Results Text** <br> ☑ Wanted to let you know that Sherry went above and beyond today to assist an employee with their benefits today.  She was very patient and explained the process very well.  The employee was very satisfied. <br><br> Select All   Deselect All <br> [Add to Comments] |
| 28. The new comments will be added to the "Comments" box.  You can modify the text as desired.  Check spelling by clicking on the "Spell Checker" button to the right of the comments box. <br><br> 29. Click the "Save and Return" button when finished. | Placer Performance Evaluation <br> **Writing Tools - Performance Notes** <br><br> **Date Range** <br> Begin Date [04/01/2016]   End Date [04/30/2016] <br><br> [Search]   [Clear] <br><br> **Comments** <br> Sherry does an outstanding job learning her rolls within the Department.  She does great research on items she really wants to learn about. Sherry is able to recognize her strengths as well as areas she needs to develop. To improve Sherry's performance, she makes a practice of soliciting feedback from others. Sherry identifies and pursues opportunities for training and development. Sherry works at building her skills and knowledge. Most of the time, Sherry makes her expertise available to others. <br><br> Wanted to let you know that Sherry went above and beyond today to assist an employee with their benefits today.  She was very patient and explained the process very well.  The employee was very satisfied. <br><br> [Save and Return]   [Cancel]   Find Additional Content [ ▼]   [Go] |
| 30. Click the "Save" button in the upper right-hand corner of your screen to save updates.  **Remember – there is no auto-save feature, so save early and often.** Continue navigating through all of the Competencies until you are finished rating and adding narrative. | Placer Performance Evaluation <br> Manager Evaluation - Update and Submit <br><br> Shares expertise with others <br> Manager Rating [3 - Meets Job Requirements ▼] <br><br> Manager Rating  3 - Meets Job Requirements <br><br> **Manager Comments** <br> Writing Tools <br> Sherry does an outstanding job learning her rolls within the Department.  She does great research on items she really wants to learn about. Sherry is able to recognize her strengths as well as areas she needs to develop. To improve Sherry's performance, she makes a practice of soliciting feedback from others. Sherry identifies and pursues opportunities for training and development. Sherry works at building her skills and knowledge. Most of the time, Sherry makes her expertise available to others. <br><br> Wanted to let you know that Sherry went above and beyond today to assist an employee with their benefits today.  She was very patient and explained the process very well.  The employee was very satisfied. <br><br> ▶ Competency 2: Cooperation <br> ▶ Competency 3: Dependability <br> ▶ Competency 4: Job Knowledge |

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| 31. | At the bottom of the evaluation you can click on the "Rating Calculation" summary button to display the Overall Manager Rating summary. | Competencies Summary<br><br>Manager Rating 3 - Meets Job Requirements<br>Manager Comments<br>Writing Tools<br><br>Sherry you are doing a great job, keep it up. |
|---|---|---|
| 32. | Navigate back to the top of the evaluation.  Be sure to complete each of the tabs listed at the top of the evaluation. | Employee Data<br>Empl ID 51231820<br>Department 170215    PRS-Employee Benefits<br>Location PERSONNEL    PRS-Personnel Department<br>Plan/Grade GNRL    76<br>Step 5<br><br>You have successfully saved your evaluation.<br>Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.<br><br>Check Language | Calculate All Ratings | Cancel Evaluation<br>Competencies | Previous Goals | Future Goals | Training Information | Placer Policies | Merit Recommendation<br>Evaluation Type |
| 33. | **Goals** - If you have "Previous Goals" or "Future Goals" to be added, click on the tab and click the link to add the goals. These do not roll over from previous evaluations, so you must enter them manually.<br>**Important Note** – At this time, you should meet with the Employee to develop and finalize future goals. You should not move the evaluation into an approved process until goals have been finalized as you will not have access to the evaluation to make changes once it is approved. | Employee Data<br>Empl ID 51233873<br>Department 170215    PRS-Employee Benefits<br>Location PERSONNEL    PRS-Personnel Department<br>Plan/Grade GNRL    76<br>Step 1<br><br>Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.<br>Check Language | Calculate All Ratings | Cancel Evaluation<br>Competencies | Previous Goals | Future Goals | Training Information | Placer Policies | Merit Recommendation<br>Previous Goals<br>Add Previous Goal<br>Audit History |
| 34. | **Placer Policies** – The Employee must review these policies annually.  They will have access to review these policies within their self-review, but if they do not, you must ensure they have access to them and have reviewed them.<br>Only print the Policy Acknowledgement Form, which should be signed by the Employee as a part of the review meeting you will have with the Employee later on. | Check Language | Calculate All Ratings | Cancel Evaluation<br>Competencies | Previous Goals | Future Goals | Training Information | Placer Policies | Merit Recommendation<br>Placer Policies<br>Workplace Discrimination, Harrassment & Retaliation Policy<br>Voicemail, E-mail, Internet and Computer Use Policy<br>Violence in the Workplace Policy<br>Drug and Alcohol Policy<br>Drug and Alcohol Policy for DSA<br>Workplace Relationships Policy<br>Policy Acknowledgement Form |

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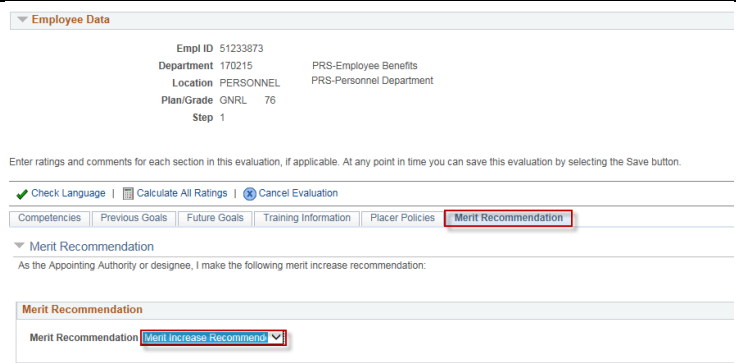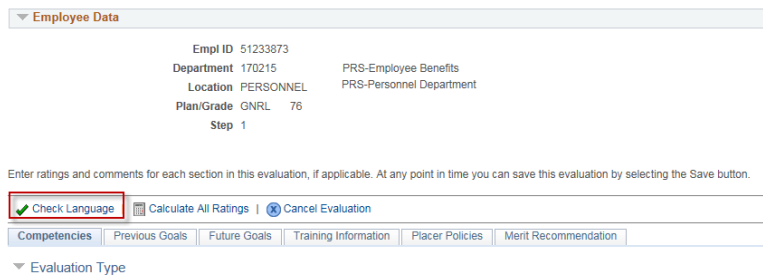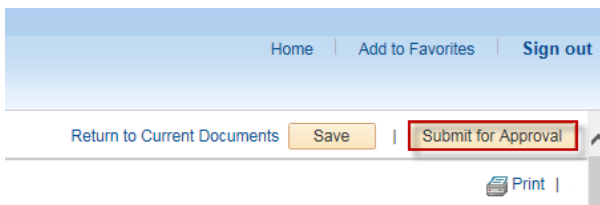Last Modified: 5-20-2016                                    Page 8

35. **Merit Recommendation** – If the Employee is due a merit, a recommendation of "Merit Increase Recommended" or "Merit Increase Not Recommended" must be selected. If there is no merit due, select the "No Merit Increase Due". **NOTE:** If you are not recommending a merit, your evaluation narrative must support the recommendation. Be sure to click the "Save" button after entering your recommendation.

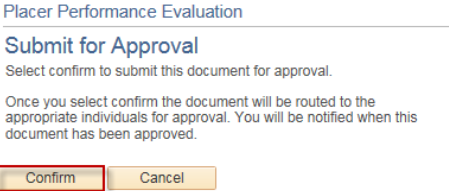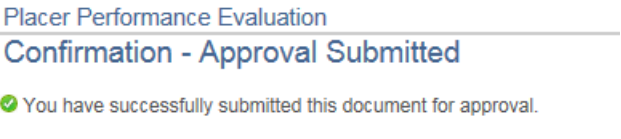36. Prior to submitting the evaluation to the next level, be sure the following have been completed.
    - All ratings within the evaluation have been completed. You will not be able to submit the evaluation if ratings are missing.
    - You have used spell check throughout the rating process. There is also a "Check Language" feature. This provides guidance during the performance process to identify words or phrases that might be objectionable. This feature allows the Supervisor to consider alternative words or phrases, if necessary.

37. The Supervisor is now ready to send the evaluation to the First Level Approver. Once the Supervisor submits the evaluation for approval you will not have the ability to edit the evaluation any further. If changes are necessary the Supervisor will be notified via e-mail and the evaluation will be returned to the Supervisor within the system.
    **NOTE** – If you wish to have the evaluation reviewed informally outside of the ePerformance system, you have the ability to do so. Click the print link

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## Supervisor/Manager Prepares an Evaluation for an Employee
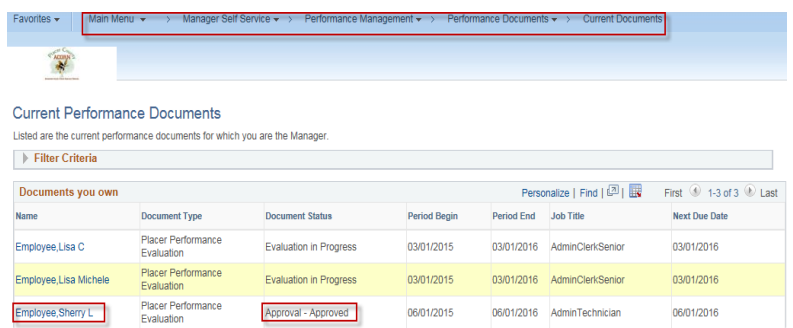
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| on the right in the evaluation and select "Save As" and save to your computer.  You can then email or print the saved evaluation and have the evaluation reviewed.  You can then input any changes necessary prior to submitting for review. Remember, once the evaluation is submitted for approval, you will not have access to make changes to the evaluation unless it is denied and returned to you.<br><br>38. Click on the "Submit for Approval" button in the upper right-hand corner. | |
| 39. Click on the "Confirm" button in the Submit for Approval screen. | Placer Performance Evaluation<br><br>**Submit for Approval**<br>Select confirm to submit this document for approval.<br><br>Once you select confirm the document will be routed to the appropriate individuals for approval. You will be notified when this document has been approved.<br><br>[ Confirm ]  [ Cancel ] |
| 40. A confirmation screen will appear. | Placer Performance Evaluation<br><br>**Confirmation - Approval Submitted**<br><br>✔ You have successfully submitted this document for approval. |
| 41. Once the Final Approver has approved the evaluation, the Supervisor will receive an email notification that it has been approved.  You can now prepare to meet with the Employee for the final evaluation meeting.  The system will give you the opportunity to share the evaluation with the Employee electronically in advance of the evaluation meeting.  This should not replace meeting with the Employee physically. | |

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## Supervisor/Manager Prepares an Evaluation for an Employee

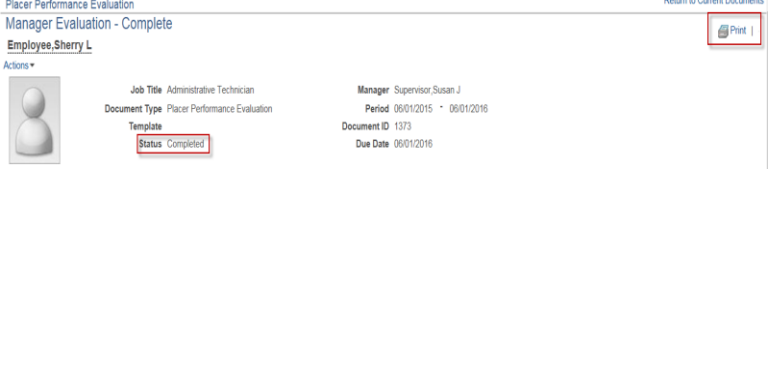| | |
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| 42. To access the evaluation after approval navigate to **Main Menu>Manager Self Service>Performance Management>Performance Documents>Current Documents**.  Click on the Employee's name whose evaluation you are working on.<br><br>43. **Evaluation was Denied** – If the evaluation was denied by one of the Approvers, an e-mail notification will be sent to you.  The Approver should provide comments as to why the evaluation was denied.  The evaluation status will be at "Approval-Denied".  The Supervisor will make the appropriate updates then resubmit the evaluation for review and approval.<br><br>44. **Approval has been received -** The Supervisor will receive an e-mail notification that the evaluation was Approved. | Favorites ▾   Main Menu ▾  >  Manager Self Service ▾  >  Performance Management ▾  >  Performance Documents ▾  >  Current Documents<br><br>**Current Performance Documents**<br>Listed are the current performance documents for which you are the Manager.<br><br>▶ Filter Criteria<br><br>Documents you own   Personalize | Find |  First  1-3 of 3  Last<br><br>Name · Document Type · Document Status · Period Begin · Period End · Job Title · Next Due Date<br>Employee,Lisa C · Placer Performance Evaluation · Evaluation in Progress · 03/01/2015 · 03/01/2016 · AdminClerkSenior · 03/01/2016<br>Employee,Lisa Michele · Placer Performance Evaluation · Evaluation in Progress · 03/01/2015 · 03/01/2016 · AdminClerkSenior · 03/01/2016<br>Employee,Sherry L · Placer Performance Evaluation · Approval - Approved · 06/01/2015 · 06/01/2016 · AdminTechnician · 06/01/2016 |
| 45. Before printing the evaluation click the "Share with Employee" button. | Placer Performance Evaluation   Return to Current Documents | Share with Employee<br>**Manager Evaluation - Share with Employee**<br>Employee,Sherry L   🖨 Print |<br>Actions ▾<br><br>  Job Title  Administrative Technician     Manager  Supervisor,Susan J<br>  Document Type  Placer Performance Evaluation   Period  06/01/2015  *  06/01/2016<br>  Template        Document ID  1373<br>  Status  Approval - Approved     Due Date  06/01/2016 |
| 46. Click the "Confirm" button to share the approved evaluation with the Employee. | **Share with Employee**<br><br>Select confirm to share this document with the employee. Next you should meet with the employee to discuss your evaluation.<br><br>Confirm     Cancel |
| 47. A confirmation window will appear stating the evaluation has been successfully shared with the employee. The Employee will receive an e-mail notification that the Supervisor has shared their approved evaluation. | Placer Performance Review<br>**Confirmation - Shared with Employee**<br><br>✔ You have successfully shared your evaluation with the employee. |
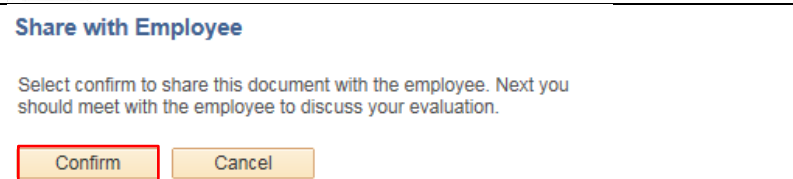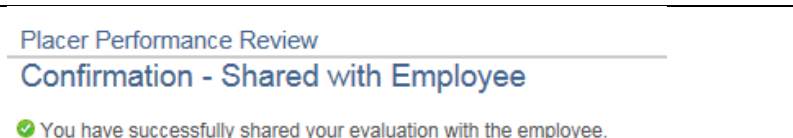
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| 48. | **Request Acknowledgement from Employee** –The Supervisor must request that the Employee acknowledges the evaluation in the ePerformance system. | Placer Performance Evaluation        Return to Current Documents \| Request Acknowledgement <br> Manager Evaluation - Request Acknowledgement    Print \| <br> **Employee,Sherry L** <br> Actions▾ <br>    Job Title   Administrative Technician     Manager   Supervisor,Susan J <br> Document Type   Placer Performance Evaluation     Period   06/01/2015 * 06/01/2016 <br> Template     Document ID   1373 <br> Status   Shared with Employee     Due Date   06/01/2016 |
| 49. | Navigate to **Main Menu>Manager Self Service>Performance Management>Performance Documents>Current Documents**. Click on the Employee whose evaluation is "Shared with Employee". Click the "Request Acknowledgement" button. | |
| 50. | Click the "Confirm" button to send an acknowledgement request to the Employee. | **Request Acknowledgement** <br><br> Select confirm to send a request to the employee asking them to acknowledge that they have read and discussed this document with you. <br><br> [ Confirm ]    [ Cancel ] |
| 51. | A confirmation window will appear stating acknowledgement request has been successfully sent to the Employee via e-mail. | Placer Performance Review <br> **Confirmation - Acknowledgement Requested** <br><br> ✅ You have successfully requested that the employee acknowledge this document. |
| 52. | **Acknowledging an Evaluation on Behalf of the Employee** - When an Employee does not have access to be able to acknowledge their evaluation, or you wish to acknowledge on the employees behalf, the Supervisor can override. **Main Menu>Manager Self Service>Performance Management>Performance Documents>Current Documents.** Click on the Employee's name whose document status is "Pending Acknowledgement". | Current Performance Documents <br> Listed are the current performance documents for which you are the Manager. <br> ▶ Filter Criteria <br><br> **Documents you own**     Personalize \| Find \| 🖼 \| 🖩   First 1-3 of 3 Last <br> **Name** \| **Document Type** \| **Document Status** \| **Period Begin** \| **Period End** \| **Job Title** \| **Next Due Date** <br> Employee,Lisa C \| Placer Performance Evaluation \| Evaluation in Progress \| 03/01/2015 \| 03/01/2016 \| AdminClerkSenior \| 03/01/2016 <br> Employee,Lisa Michele \| Placer Performance Evaluation \| Evaluation in Progress \| 03/01/2015 \| 03/01/2016 \| AdminClerkSenior \| 03/01/2016 <br> Employee,Sherry L \| Placer Performance Evaluation \| Pending Acknowledgement \| 06/01/2015 \| 06/01/2016 \| AdminTechnician \| 06/01/2016 |
| 53. | Click the "Override Acknowledgement" button. | Return to Current Documents    [ Override Acknowledgement ] |

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## Supervisor/Manager Prepares an Evaluation for an Employee

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| 54. Click the reason the Supervisor will be overriding the acknowledgement. Click the "Confirm" button. | **Acknowledge**<br><br>You have chosen to override your employee's acknowledgement of this document. Please indicate the reason for doing so.<br><br>⦿ Employee Not Available<br>○ Employee does not have access<br><br>Select confirm to move the document to the next status.<br><br>[ Confirm ]   [ Cancel ] |
| 55. A confirmation screen will appear. | Placer Performance Evaluation<br>**Confirmation - Acknowledgement Overridden**<br>✔ You have successfully overridden the employee acknowledgement and moved the document to the next status. |
| 56. **Supervisor Finalizes the Evaluation** – Once the Employee's acknowledgement is complete the Supervisor will finalize the evaluation. This should happen before you meet with the employee. Navigate to: **Main Menu>Manager Self Service>Performance Management>Performance Documents>Current Documents**.  Click on the Employee's name whose document status is "Acknowledged". | Current Performance Documents<br>Listed are the current performance documents for which you are the Manager.<br>▶ Filter Criteria<br><br>Documents you own — Personalize \| Find \| 🖾 \| 🖩    First ◉ 1-3 of 3 ◉ Last<br><br>| Name | Document Type | Document Status | Period Begin | Period End | Job Title | Next Due Date |<br>|---|---|---|---|---|---|---|<br>| Employee,Lisa C | Placer Performance Evaluation | Evaluation in Progress | 03/01/2015 | 03/01/2016 | AdminClerkSenior | 03/01/2016 |<br>| Employee,Lisa Michele | Placer Performance Evaluation | Evaluation in Progress | 03/01/2015 | 03/01/2016 | AdminClerkSenior | 03/01/2016 |<br>| Employee,Sherry L | Placer Performance Evaluation | Acknowledged | 06/01/2015 | 06/01/2016 | AdminTechnician | 06/01/2016 | |
| 57. Click the "Complete" button. | Return to Current Documents  \|  [ Complete ]<br><br>🖶 Print  \| |
| 58. Click the "Confirm" button.  Upon clicking confirm the Supervisors electronic signature is added to the evaluation. | **Complete Evaluation**<br><br>You have almost finalized this document. If you have no further entries select confirm to complete this document.<br><br>[ Confirm ]   [ Cancel ] |

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| 59. A confirmation window will appear.<br>**Note**: Once an evaluation is complete no further changes can be made. In addition, any Supervisor notes will be deleted. | Placer Performance Evaluation<br>**Confirmation - Document Completed**<br>⊘ You have successfully completed your evaluation. |
| 60. **Printing the Performance Evaluation** – An evaluation can be printed at any time, but should be printed after the evaluation is in a "Completed" status. Navigate to **Main Menu>Manager Self Service>Performance Management>Performance Documents>Historical Documents.**<br>61. Click the "Print" button in the upper right-hand corner. | Placer Performance Evaluation — Return to Current Documents<br>Manager Evaluation - Complete — 🖨 Print<br>**Employee,Sherry L**<br>Actions▾<br>Job Title Administrative Technician   Manager Supervisor,Susan J<br>Document Type Placer Performance Evaluation   Period 06/01/2015 · 06/01/2016<br>Template   Document ID 1373<br>Status Completed   Due Date 06/01/2016 |
| 62. The evaluation will appear in a new window. Once you are finished viewing, you can close the window and return to the ACORN system. Now that the evaluation is complete, ensure that the Employee signs the evaluation and follow the normal department process for submission to the HR Department.<br><br>**This completes the ePerformance process.** | Placer Performance Evaluation<br>Manager Evaluation - Completed<br>**Employee,Sherry L**<br>Actions▾<br>Job Title Administrative Technician   Manager Supervisor,Susan J<br>Document Type Placer Performance Evaluation   Period 06/01/2015 · 06/01/2016<br>Template   Document ID 1373<br>Status Completed   Due Date 06/01/2016<br>▼ Employee Data<br>Empl ID 51231820<br>Department 170215   PRS-Employee Benefits<br>Location PERSONNEL   PRS-Personnel Department<br>Plan/Grade GNRL 76<br>Step 5 |

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